SENTA®

Setting up Senta for success

Senta is a sublime, cloud-based practice management tool for accountants and bookkeepers. We promise easy-to-configure CRM, powerful workflow, integrations with your favourite apps, and a user-friendly client portal. But, we know setting up your practice with a brand new management tool can be a little daunting. So, we've created this guide to explain how you can get Senta working for you as quickly as possible.
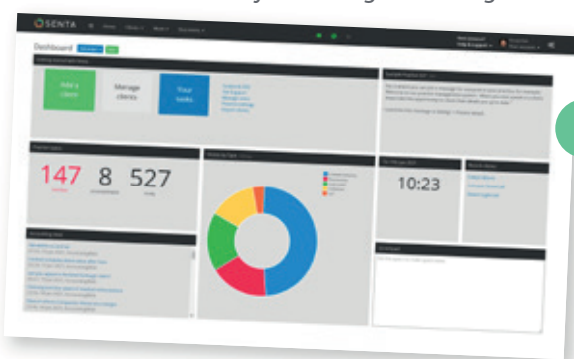
The basic setup
(2 - 3 hours)

STEP 1
I've signed up for a free trial - what happens next?
You'll receive your login details. We recommend you book a call with the support team who can run you through how to get started.

STEP 2
Familiarise yourself with your dashboard
The dashboard comes out-the-box with widgets including calendars, task lists, recent client lists, etc - and you can add more and customize it in a way that suits you.
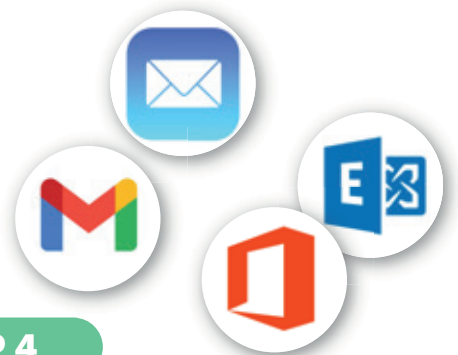
STEP 3
A little bit of housekeeping
Add your practice details, logos and any welcome messages.

STEP 4
Set up your email integration
Senta integrates directly with most email providers - including Gmail, Exchange, Office 365 and more. Setting up the integrations means your emails will be stored and displayed as part of your client records.

STEP 5
Practice with the test clients
A good place to start is the various test clients that come as part of the free trial. You can set up workflows, jobs, tasks, emails, client onboarding, repeat jobs and more.

STEP 6
Customise the standard emails
Senta comes with template emails built in to jobs that suit a variety of tasks - and you can customise these and add relevant dynamic fields.

STEP 7
Set up your app integrations
To make your life easier, Senta connects with your favourite apps including FreeAgent, GoProposal, QuickBooks, Xero and Zapier (to name a few). You can switch integrations on and off via the 'Extras' tab.

Practice makes perfect!
Senta comes loaded with dummy clients so you can test different variations of jobs, tasks and workflows without having to use your real clients.

Now you're ready to get started configuring Senta to work for you and adding your client data

Configuring Senta to your needs

Every practice does things slightly differently, and you can set up Senta exactly the way you like it. You can customise workflows, jobs, forms and associated emails and even inbuilt things like drop down lists, client forms and contact forms.

Don't worry about making mistakes, we can always reset your Jobs to their original state.

Change Senta jobs, tasks, workflows and forms to suit you.

Jobs
These are complete pieces of work, such as 'Accounts Production', made up of tasks and deadlines. Senta comes with template jobs already set up, and you can amend or add to them as you need.

Tasks
This is the detail. It's the different pieces of work that need to be completed. They'll be in lists and assigned to users as appropriate - and practice managers can check-in on progress.

Services
Set the frequency or dates with any service. Create jobs, or collections of work. E.g. Payroll jobs.

Forms
These can be used to gather and record a wide range of information for your clients. An existing form can be edited or a new form can be created.

Final step: add your real client data

You can either input a few clients' details while you're getting used to Senta, or do a bulk upload from a CSV file. UK based companies can import clients from Companies House - so you'll have all their key information and accounting dates connected.

**And that's it -
You're ready to get started!
We're on hand to support you all the way!**

Getting your team involved
We can provide support via virtual training sessions for your team and even create custom training videos. There's an extensive library of videos and how-to guides - plus a friendly, dedicated support team who love to solve problems and find new ways of using Senta.

If you have any questions contact our support team at support@senta.co

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A bit about Senta...
Senta provides sublime practice management software for accountants and bookkeepers all around the world. It's a cloud-based CRM and workflow tool which combines email & text automation, secure document exchange and a client portal to support you in running your practice and delivering excellent client service.

30 day free trial
30 days is all it takes to love us. **You can sign up for a free trial today.** No credit cards or commitment required. And we'll give you all the help you need to get up and running, quickly.